

**ACCESS Apply For Benefits: Process/Systems Concerns from Local Agencies**  
**Updates as of 1/30/07**

	Issue	Timing	Discussion/research															
Duplicate applications and/or worker assignments	<p>1. Agencies are receiving duplicate applications. This includes:</p> <ul style="list-style-type: none"> <li>- Applications from people who are already on benefits</li> <li>- Applicants who apply online for MA and then for FS (or vice versa)</li> <li>- Applicants who set their filing date and then submit a full application</li> <li>- Applicants who apply in one county and then another</li> <li>- Applicants who apply once, wait a few days, and apply again</li> </ul> <p>Duplicate applications are a workload concern in general, but they are a problem especially when applications are assigned prior to the agency realizing that the applicant already has an ACCESS application or an open case. The manual processing of applications on open cases also adds to agency workload.</p> <p>Agencies have also suggested that automated assignment of applications to the primary caseworker if the customer is already open for benefits.</p>	<p>1/26/07 release</p> <p>PCR 29439 – timing TBD</p>	<p><i>Research</i>  We researched duplicate applications, with the following results:</p> <p>Number of Cases that have been processed from or linked with ACCESS Applications: 8410</p> <table border="0"> <tr> <td>Number of Cases with 1 ACCESS application:</td> <td>8026</td> <td>(95.4 %)</td> </tr> <tr> <td>Number of Cases with 2 ACCESS applications:</td> <td>337</td> <td>(4.0 %)</td> </tr> <tr> <td>Number of Cases with 3 ACCESS applications:</td> <td>36</td> <td>(0.4 %)</td> </tr> <tr> <td>Number of Cases with 4 ACCESS applications:</td> <td>8</td> <td>(0.09 %)</td> </tr> <tr> <td>Number of Cases with 5 ACCESS applications:</td> <td>3</td> <td>(0.03 %)</td> </tr> </table> <p>Approximately 1/3 of ACCESS applications have been linked to an open case.</p> <p>Applications submitted to the wrong county:  Number of ACCESS Applications submitted to CWW: 11619  Number of ACCESS Applications transferred to another county: 211 (1.8 %)</p> <p><i>Next Steps</i>  Our 1/26/07 enhancement should help to streamline the process with duplicate applications:</p> <ul style="list-style-type: none"> <li>✓ Agencies are now able to include ACCESS applications in their search of potential matches</li> <li>✓ We have automated the process of linking an ACCESS application to an open case</li> </ul> <p>In addition, agencies that are assigning cases from the inbox may want to modify their process: before making an assignment, staff can create an RFA from the ACCESS application. The RFA process automatically searches for existing people and allows for linking of an access application to an already open case. This will help staff to identify whether the application should go to the existing worker on an already-open case, or if it's a new applicant who is not already open for benefits. Once the RFA is created, it can be assigned to the appropriate worker from the RFA summary page.</p> <p>PCR 29439 is written to research whether it would be possible to do a SSN comparison for all applicants as soon as the application is received. This would allow us to add an inbox flag for applicants who are already known to CARES. With this PCR, we are also researching the feasibility of automated assignments for local agencies that use a primary caseworker model.</p>	Number of Cases with 1 ACCESS application:	8026	(95.4 %)	Number of Cases with 2 ACCESS applications:	337	(4.0 %)	Number of Cases with 3 ACCESS applications:	36	(0.4 %)	Number of Cases with 4 ACCESS applications:	8	(0.09 %)	Number of Cases with 5 ACCESS applications:	3	(0.03 %)
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	2. In some cases, the SSN or date of birth is missing, leading workers to create a duplicate individual.	9/06 release	We cannot require either of these fields prior to letting someone set their filing date.  In September, we added an optional field for customers to give their date of birth, even if they only want to set their filing date. If they choose to continue with the application, date of birth is mandatory. This should reduce the number of times that local agencies get applications without an SSN or DOB.
	3. Based on SSN and/or DOB, could ACCESS alert the client that an application has already been submitted and the agency has 30 days to process?	PCRs 29443 and 29437– timing TBD	Security and privacy concerns prevent us from giving customers a significant amount of information about applications that may have already been received. With these considerations in mind, PCR 29443 has been written to research options for doing a real-time match with submitted applications.  PCR 29437 has been written to modify text on the thank-you page and on the instructions pages that would discourage people from sending a second application.
	4. The client needs more information/directions on how to appropriately use ACCESS, such as designated sections in the instruction pages for those clients who have never applied before and not currently receiving ANY assistance, another section for those currently open for one program and want to request another program, maybe a section on explaining this system is not for doing reviews.	PCR 29437 – timing TBD	PCR 29437 has been written to improve the instructions for the customers about how to use ACCESS – without writing long instructions that they may not read. One option is a more direct link to Check My Benefits to encourage people to check their benefit status if they're not sure about whether they are open for benefits right now.
<b>Inappropriate applications</b>	5. Users are using ACCESS to complete reviews or to reapply for benefits after a case has closed because of a failure to complete a review.	Planned 2008 release	Our current plan is to modify ACCESS in 2008 to include reviews/renewals. Although agencies/customers can use ACCESS applications as part of the review process (much like they use mail-in applications for MA reviews), the concern from agencies is that there is no way to distinguish a review from a new application in the Inbox.
	6. Applications have been submitted for Badger Care from individuals without children.	Planned 6/07 release	When we add EBD MA to ACCESS in late spring 2007, we are planning to warn the applicant if it looks like they don't meet basic non-financial criteria for Medicaid. This should limit the number of applicants who don't meet basic MA criteria. However, we will not prevent applicants from exercising their right to apply.

	<p>7. SSI recipients and men are applying for the Family Planning Waiver. One SSI applicant submitted three separate applications within a one month time frame.</p> <p>Many college students who apply for FPW also apply for FoodShare, even though many college students are not eligible.</p>	<p>PCR 29437 – timing TBD</p>	<p>At the beginning of ACCESS, we describe FPW in the following way: “This program gives confidential, no-cost family planning services and supplies to women between the ages of 15 and 44.” PCR 29437 has been written to emphasize the non-financial criteria for FPW. One possibility: in the individual program request section, we could reword the FPW selection to say “Family Planning Waiver Program (for women ages 15 to 44)”.</p> <p>PCR 29437 also includes links to more information about student eligibility for FS.</p>
	<p>8. Individuals have applied as single persons, who are actually living in households with their spouse.</p>	<p>1/26/07 release</p>	<p>These applications may have come from people who are setting the filing date, in which case ACCESS doesn’t ask about other people in the home. In the 1/26/07 release, we added an inbox indicator that makes it easier for workers to determine whether the application is a full application or just a page 1.</p>
	<p>9. Applicants with too much income are applying for benefits – could we require applicants to complete Am I Eligible? prior to applying, and/or bring the information from Am I Eligible? over to the online application?</p>	<p>Not scheduled</p>	<p>Requiring customers to screen before applying would keep us from meeting our goal of having a 30-40 minute online application process. Users may choose to screen before applying. Although they can link directly from AIE to the online application, we cannot carry data over from AIE to AFB given that the level of detail is much higher in AFB. For example, we ask for age in AIE and birth date in AFB.</p>
<p>Questions left blank</p>	<p>10. Many application questions are left blank for a variety of reasons. Absent Parent Screens that are left blank are the most common. Good Cause is claimed when actually there is not good cause.</p>	<p>Fix re: good cause for 1/26/07 release</p>	<p>On 1/26/07, we added links to the good cause notice and the good cause claim. This may help with educating customers about what good cause is.</p>
	<p>11. While applicants have established a filing date, many have done so without requesting a specific program of assistance.</p>	<p>1/26/07 release</p>	<p>Assuming that this problem is with not having individual-level program requests, we think this is a result of not knowing whether the application is a page 1 or a full application. As noted above, the 1/26/07 release should make it easier for workers to determine whether the application is a full application or just a page 1.</p>
	<p>12. Earned Income. Many applicants have incorrectly completed this section or have left it blank. Many applicants list their weekly hours instead of their hours per pay period.</p>	<p>1/26/07 release</p>	<p>We implemented a change to ask for hours per week with our 1/26/07 release.</p>
	<p>13. Insurance – The majority of the applications received have left this section blank, even when private health care insurance does exist.</p>	<p>1/26/07 Planned release for 6/07</p>	<p>Right now, we don’t ask the applicant detailed questions about health insurance. When we add EBD MA to ACCESS, we plan to add some of this detail.</p> <p>For the 1/26/07 release, we require that the customer chooses “no one” or someone in the home as having health insurance.</p>

	14. The address section of the application does not translate correctly to CWW.	1/26/07 release	We implemented a fix to the address translation with our 1/26/07 release.
	15. It is possible for a customer to skip the Priority Service (PS) questions, then provide information about income later in the application. The customer appears to be PS eligible, even though they do not meet the criteria. Is it possible to cross-check the PS answers against the detailed income information that customer provides?	PCR 29438 – timing TBD	Because the PS questions ask about the current month only (unlike the income questions, which could collect information that starts in a future month), we cannot override the PS answers with information gathered in another question. PCR 29438 has been written to add a warning for someone who appears to skip all of the PS questions.
Other	16. Agencies are receiving applications from homeless individuals without contact information.	1/26/07 release	We researched this issue and found that out of 10421 ACCESS applications submitted to CWW: <ul style="list-style-type: none"> <li>- 354 applications have indicated that they are homeless but have given some sort of contact information (3.4%).</li> <li>- 17 applications have indicated that they are homeless and not provided any contact information.</li> </ul> <p>On 1/26/07, we implemented a warning message for homeless individuals who have not provided an address or phone number. We ask for contact information but let them know that if they don't have any contact information to provide, they need to get in touch with the local agency.</p>
	17. If a customer declines Priority Service, the inbox item stays red.	Not scheduled	If a customer declines PS, the inbox item stays red. The DHFS Web Projects Core Group thought it was valid for these items to stay red in order to prioritize customers who still qualify for Expedited Issuance. This issue will be discussed in more detail at the next IMAC IT meeting.
	18. It would be helpful for ACCESS to provide customers with more of the information that workers are required to give to customers in person or by mail.	Not scheduled	As a longer-term project, we will a look at whether ACCESS can automate more of the steps that workers take at the beginning of eligibility. One example is incorporating the children's identity affidavit into ACCESS – PCR 29638
	19. The inbox does not include any indication of whether the customer has requested a phone interview. In addition, workers are required to enter case comments if a phone interview is requested.	1/26/07 release  PCR 29442 – timing TBD	On 1/26/07, we added an indicator to the inbox that will show whether the customer has requested a phone interview. We also display the hardship reasons on the application summary.  PCR 29442 has been written to automate a worker comment on the hardship.